

IFAS 7i Navigation

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Navigation

Overview

Introduction The 7i version of IFAS has a new view in the form of a website browser window. The following information describes the new window, icons, and menu options.

In this chapter This chapter contains the following topics.

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Before You Begin

Introduction	The following information describes tasks that you must complete before you begin working on the IFAS 7i screen for the first time.
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Allow pop-ups	The first time you open the screen in IFAS 7i, a message appears in the browser advising you to allow pop-ups for this website. Click on the message and choose the option, <i>Always allow pop-ups on this site.</i>
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Enable Workflow	The first time you click the Workflow tab in the IFAS 7i screen sidebar, you will see an Enable button. You must click the Enable button before you can begin using this feature.
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Choose ledger	If you need to use another ledger when entering items in the screen, you must choose the ledger option the first time you enter the information in the Key-Object field.
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About blank	If the program stalls when you open the IFAS 7i Requisition screen and the message at the top of the screen says About Blank, use the following steps to resolve the problem.
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Step	Action
1	Open the Internet Explorer program. A browser window opens.
2	Click the Tools menu option at the top of the browser window. A drop-down list opens.
3	Click the Internet Options menu option from the drop-down list. The Internet Options window opens.
4	Click the Settings button under the Tabs section in the General tab. The Tabbed Browsing Settings window opens.
5	Click the Restore Defaults button at the bottom left-hand corner, and click the OK button. The Tabbed Browsing Settings window closes.
6	Click the Advanced tab in the Internet Options window. The Advanced tab opens.

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Before You Begin, Continued



About blank (continued)

Step	Action
7	Click the Restore Advance Settings and the Reset buttons at the lower right side of the window. The Reset Internet Explorer Settings window opens.
8	Click the Reset button at the bottom. The program begins resetting the Internet Explorer settings.
9	Click the Close button when the process is complete. The program opens a message window telling you that you must restart the program for the changes to take effect.
10	Click the OK button in the message window. The window closes.
11	Click the OK button in the Internet Options window to complete the procedure.
12	Restart your computer.

IFAS 7i POC SHR View

Introduction The following information describes the IFAS 7i POC SHR view and the toolbar icons.







7i POC SHR view The following image shows the IFAS 7i POC SHR view that initially opens with the sidebar menu only partially in view. See the section titled *IFAS 7i Sidebar Menu* for the expanded view.

Icon	Function
	The double-arrow circle is a toggle button to expand or contract the view of the sidebar menu.
	The right and left arrows in the navigation bar allow you to go to the next record or to the previous record.

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IFAS 7i POC SHR View, Continued

7i POC SHR view (continued)

Icon	Function
	The New Record icon in the Navigation bar opens a new record for data entry. Click the New Record icon to change to Browse mode.
	The Binoculars icon indicates the Find/Search menu. The down arrow beside the binoculars indicates a drop-down menu. Click the Binoculars icon to view the drop-down menu.
	The Options icon, with the down arrow, opens a drop-down menu of available functions.
	The program displays the screen mode, e.g., Add or Find, at the far right of the Navigation bar.
	The record count at the far right of the Navigation bar is visible in the Browse mode only and allows you to choose the record you want to view. Click the New Record icon to change to Browse mode.
	The Ellipsis button means that there are menu options you can choose, and you can access the Lookup feature in the drop-down menu.

Optional IFAS mask search

All the IFAS 7i procedures documented in the following pages show access to the IFAS masks through the IFAS tree. If you already know the mask you want to work on, you can use the optional mask search by entering the mask name in the type-ahead box, and then pressing the Enter key. This shortcut takes you directly to the mask you entered.

Choose a Record

Introduction

The following information explains how to choose a record using the Record Count button located at the far right of the Navigation bar. You must be in the Browse mode to see the Record Count button.

Choose a record

Use the following steps to choose a record using the Record Count button. You must be in the Browse mode to see the Record Count button.

Step	Action
1	Click the Record Count button to choose a record. The following window opens. 
2	Enter the record number you want to view in the Go to record number: field.
3	Click the OK button. The record opens.

The Options Icon

Introduction The Options menu allows you to make changes to your view of the record you are working on, the records themselves, and change settings.

Options drop down menu The following image shows the Options drop-down menu.



Menu Option	Function
Show Grid	The Show Grid option allows you to toggle between Show Grid and Hide Grid.
Sort Order	The Sort Order option allows you to sort by different criteria.
Undo Changes	The Undo Changes option allows you to undo the last action.
Undo All	The Undo All option allows you to undo all changes since the last save.
Copy Record	The Copy Record option allows you to copy information to the clipboard.
Paste Record	The Paste Record option allows you to paste information to the clipboard. Note: You must be in the Add mode to use the Paste Record option.
Delete Record	The Delete Record option deletes the record.
Close Window	The Close Window option closes the window.

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The Options Icon, Continued

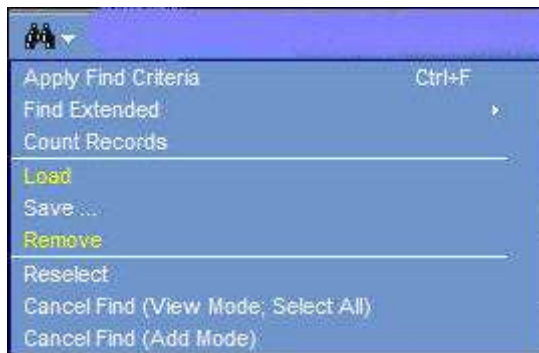
Options drop down menu (continued)

Menu Option	Function
Settings	The Settings option allows you to choose the GL or JL ledger.
Help	The Help option provides the IFAS 7i version information, and Bi-Tech module documentation.

The Binoculars Icon

Introduction The Binoculars icon allows you to perform different search and highlight functions.

Binoculars drop-down menu The following images show the Binoculars drop-down menu. Some menu options are only visible or available when you are in the Find mode. You can search on any field. Use the asterisk as a wild card.



Find Mode



Add or Browse Mode






Menu Option	Function
Apply Find Criteria	The Apply Find Criteria option is only available when in the Find mode. The current selection criteria is applied.
Find/Search	The Find/Search option allows you to search for a record or set of records.
Find Extended	This option is not available at this time.
Count Records	The Count Records option shows the number of records currently open.
Load	This option is not available at this time.
Save	This option is not available at this time.
Reselect	Use the Reselect option to return to the most recently loaded Find definition.
Select All	The Select All option allows you to return to the unfiltered database.
Cancel Find (View Mode; Select All)	This Cancel Find option allows you to cancel the find and brings you back to the Browse mode.
Cancel Find (Add Mode)	This Cancel Find option brings you back to the Add mode.

Lower Navigation Bar

Introduction The following information describes the icons in the Lower Navigation bar. The Lower Navigation bar guides you through the lower frame of the web-browser window no matter which IFAS 7i module you are working in.

Lower Navigation bar The following image shows the Lower Navigation bar icons and the icon functions.

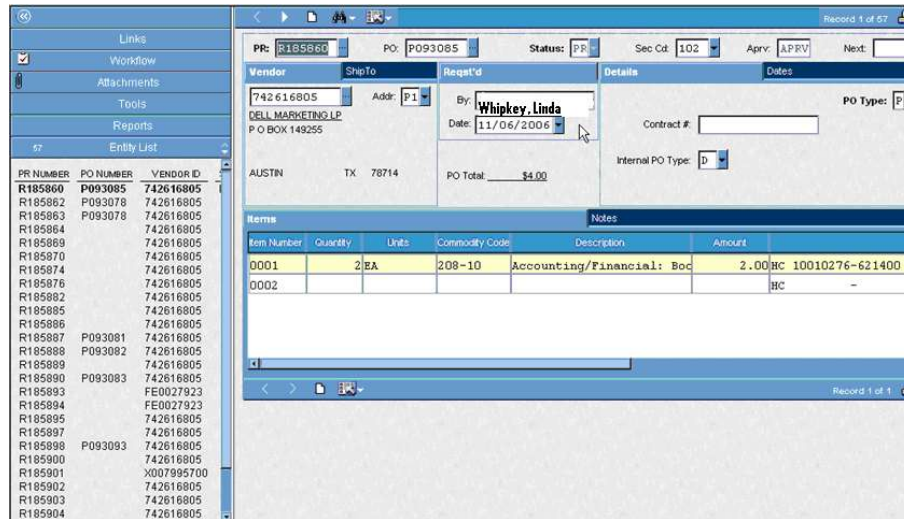


Icon	Function
	The right and left arrows in the Lower Navigation bar allow you to go to the next record or to the previous record.
	The New Record icon in the Lower Navigation bar opens a new record for data entry.
	The Options icon, with the down arrow, opens a drop-down menu of available functions.
	The program displays the screen mode, e.g., Add or Find, at the far right of the Navigation bar.
	The record count at the far right of the Navigation bar is visible in the Browse mode only and allows you to choose the record you want to view.

IFAS 7i Sidebar Menu

Introduction The following information describes the expanded IFAS 7i sidebar menu.

7i sidebar menu The following image shows the sidebar menu on the left side of the window.



Options	Function
Links	This option is not available at this time.
Workflow	The Workflow option allows you to access Workflow information.
Attachments	The Attachments option allows you to view attached files. A lone paperclip icon indicates that there are no attachments. A paperclip with a yellow page icon indicates that attachments are available. You must set up to view attachments in the Settings options located in the Options drop-down menu.
Tools	This option is not available at this time.
Reports	This option is not available at this time.
Entity List	The Entity List tab displays all records. Double-click any number to view the record. The previously viewed records are designated in blue. The current record is bolded.

IFAS 7i Keyboard Commands

Introduction The following information explains each short-cut keyboard command and its function.

Keyboard commands The following table describes the short-cut keyboard commands and their functions.

Keyboard Command	Function
CTRL +A	Add a new record button in the web-browser frame in which the cursor is located.
CTRL+D	Delete a record in the web-browser frame in which the cursor is located.
CTRL+F	Toggle the Find mode On and Off.
CTRL+G	Toggle the Grid mode On and Off.
CTRL+L	View the drop-down menu associated with a field with a down arrow.
CTRL+T	Display the next auto-generated seed value for a field.
CTRL+N	Move to the next record in the web-browser frame in which the cursor is located.
CTRL+P	Move to the previous record in the web-browser frame in which the cursor is located.
CTRL+1, 2, 3, 4...	Move to another tab in the window. Example: If there are four tabs in the web-browser frame in which the cursor is located, press CTRL+3 to move to the third page from the left.
F5	Refresh the screen.
TAB	Move through the fields.
SHIFT+TAB	Move the cursor back through the fields.
SHIFT+CTRL+T	Toggle the debug tracing On and Off.
CTRL +	Zoom out.
CTRL -	Zoom in.

Lookup Feature

Introduction

The following information explains how to use the IFAS 7i Lookup feature. The following example shows the Lookup feature used to search for a vendor, but you can also search for a name or a PEID number.


Key-Object field lookups

The Lookup feature is also available for Key-Object field lookups.

- Click the Key-Object field sub-field that you want to search.
- Click the Ellipsis button at the far right side of the Key-Object field to open the drop-down menu. The drop-down menu displays the Lookup option specifically for the sub-field in which your cursor is located.
- Click the Lookup option to access the Data Lookup window.

Use Lookup

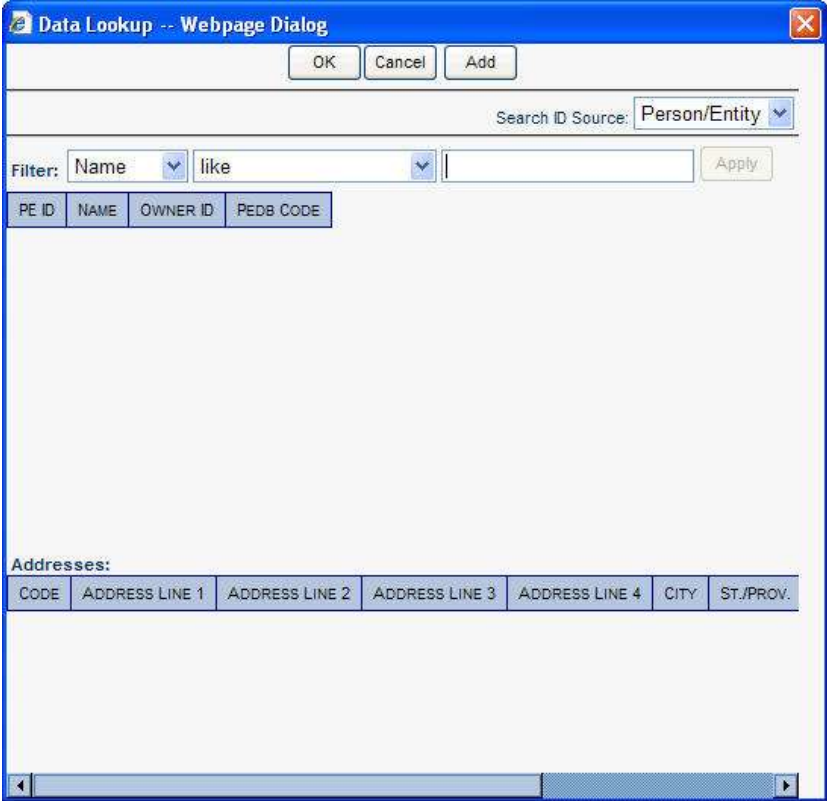
Use the following steps to use the Lookup feature.

Step	Action
1	<p>Click the Ellipsis button beside the field with this option. A drop-down list opens.</p> 

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Lookup Feature, Continued

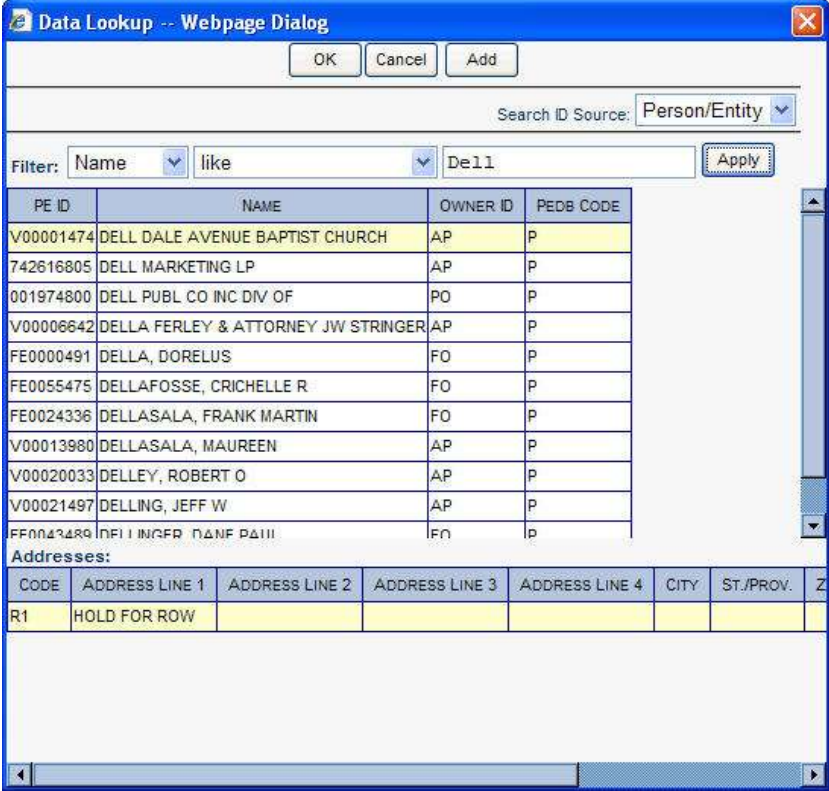
Use Lookup (continued)

Step	Action
2	<div><p>Click the Lookup option. The following Data Lookup window opens.</p></div>

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Lookup Feature, Continued

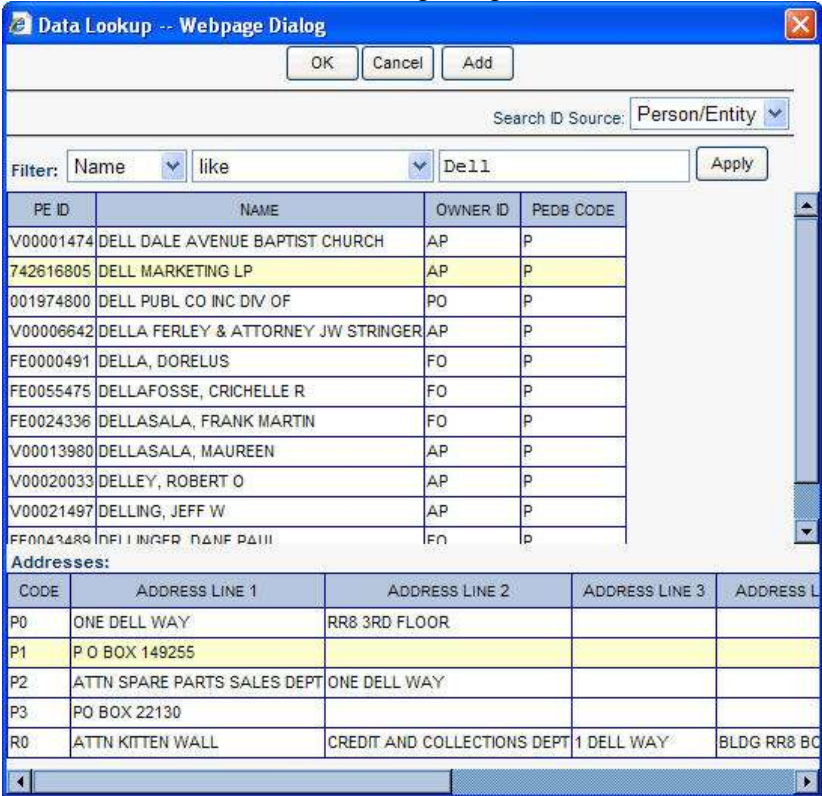
Use Lookup (continued)

Step	Action
3	<p>Choose the filter options from the two drop-down lists, enter a name or number in the search-value field, and click the Apply button or press Enter. A list of options appears as shown in the following image.</p>  <p>Note: The search value field could be case sensitive.</p> <p>Note: You can place an asterisk before the search value to view all records that contain the search word within the name.</p>

Continued on next page

Lookup Feature, Continued

Use Lookup (continued)

Step	Action
4	<p>Highlight a name. An address or list of addresses appears at the bottom as shown in the following image.</p>  <p>Note: When creating a purchase order requisition, always choose an address that contains a P in the Code column.</p>
5	<p>Highlight the address you want to use, and click the OK button at the top of the Data Lookup window or double-click the address. The Data Lookup window closes, and the program displays the address in the Vendor tab of the requisition screen.</p>